New Client Intake Process

INSTITUTIONAL INVESTORS – FIDUCIARY MANAGEMENT

ALLODIUM®
INVESTMENT CONSULTANTS

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VALUES MEETING	**DIAGNOSTIC MEETING**	**PROPOSAL MEETING**	**IMPLEMENTATION MEETING**
OUR PURPOSE: Determine if we may be a match	**OUR PURPOSE:** Understand you and your financial goals	**OUR PURPOSE:** Share the investment proposal with you	**OUR PURPOSE:** Align and initiate your investment strategy
Meeting duration: 1 hour	*Meeting duration: 2 hours*	*Meeting duration: 2 hours*	*Meeting duration: 2 hours*
WHAT WE DO: • We learn what's important to you • We learn why you are seeking an advisor	**WHAT WE DO:** • We ask questions to learn your story (goals, background, history, etc.) • We assess your risk profile	**WHAT WE DO:** • We present your investment proposal and fiduciary planning opportunities • We explain fees and any tax implications	**WHAT WE DO:** • We clarify any investment strategy modifications • We gather your communications preferences
WHAT YOU DO: • You learn about our investment philosophy • You learn how we are compensated	**WHAT YOU DO:** • You provide your financial documents • You share your financial goals	**WHAT YOU DO:** • You ask questions • You are able to request modifications to the proposal	**WHAT YOU DO:** • You confirm your investment plan • You sign implementation paperwork

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